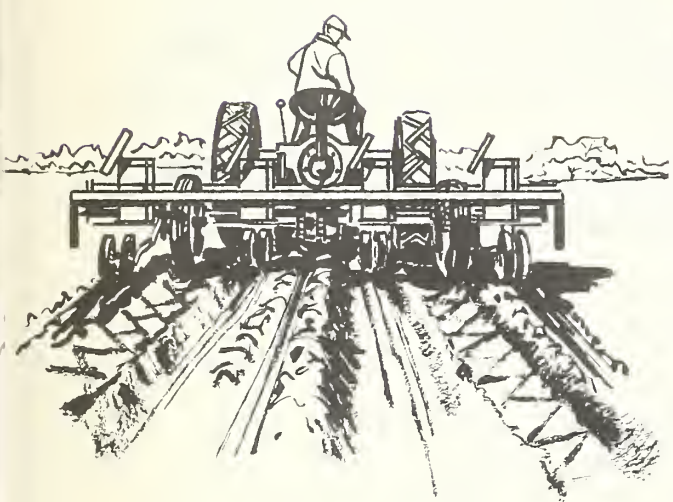


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**1969
SUMMER AND FALL
VEGETABLES FOR
COMMERCIAL
PROCESSING**



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ACREAGE- MARKETING GUIDES

U.S. DEPARTMENT OF AGRICULTURE-CONSUMER AND MARKETING SERVICE
March 1969 AMG 66

PREFACE

Acreage-marketing guides are prepared each year for major vegetables used for canning and freezing. The commodities included are lima beans, snap beans, beets, cabbage for kraut, sweet corn, cucumbers for pickles, green peas, spinach and tomatoes.

USDA's Consumer and Marketing Service continually studies markets for various vegetable products. On the basis of these studies, commodity specialists develop recommendations of acreage levels which are likely to result in supplies which equal market needs. In turn, these recommendations are reviewed by representatives of other USDA agencies who are familiar with the vegetable industry.

The guide for each commodity tells the grower whether he should plant the same amount as in the previous year or increase or decrease his acreage. The recommendation for each commodity is presented in terms of a percentage change from the total acreage planted in the previous year. He can apply this percentage change to his individual operation.

The final recommendations for 1969 vegetables for commercial processing are presented in this publication. In the past when acreage has been held within the levels recommended by USDA, few marketing difficulties have been encountered.

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1969 ACREAGE-MARKETING GUIDES

VEGETABLES FOR COMMERCIAL PROCESSING

I. HIGHLIGHTS

A moderate increase in total acreage, high average yields, and a record output of commercial vegetables for processing were reported in 1968. For several commodities, both the 1968 carryover and the 1968 pack were quite high. As a result, total supplies of principal vegetables, particularly sweet corn, tomatoes and tomato products, for marketing in 1968-69 were extremely large. With supplies heavy, prices for canned and frozen vegetables were under pressure in the fall and winter of 1968-69. With an exceptionally large carryover of both canned and frozen packs likely in 1969, the 1969 acreage and production of vegetables for processing should be decreased if supplies are to match normal market needs.

II. 1968 CROP SUMMARY

The total planted acreage in 1968 of 9 principal crops for processing (lima and snap beans, beets, cabbage for sauerkraut, sweet corn, cucumbers for pickles, green peas, spinach and tomatoes) was 5 percent more than in 1967. A relatively large increase in acreage was recorded for beets, up 13 percent, tomatoes up 11 percent, sweet corn, up 9 percent, and lima beans, 8 percent. Also, total plantings of green peas were increased 4 percent. Snap bean acreage was reduced moderately, as were total plantings of cucumbers and spinach.

In spite of the usual extremes in weather during the crop season, the 1968 average yield for vegetables was relatively high; sweet corn and tomato yields set a record.

With acreage and yield patterns showing an overall increase, total production of 9 vegetables was a record 12.0 million tons, more than one-fifth above 1967. Tomato production was a record, up 34 percent compared with the high level in 1967. Beet and sweet corn production each were a record, with beet tonnage 30 percent above 1967, and sweet corn output 18 percent higher. Cabbage and cucumber tonnages for processing were down sharply from the respective high outputs in 1967.

Prices paid to growers for 1968 crop lima beans increased sharply compared with 1967. But for other commodities, value per unit in 1968 showed a relatively small change compared with a year earlier. For the 9 vegetable crops for processing, total value was estimated at \$559 million, 13 percent above the 1967 total of \$494 million. Tomato and sweet corn receipts accounted for most of the increase in 1968.

California continued as the leading source of vegetables for processing, contributing two-fifths of the total production and total value. Wisconsin was the second in rank with approximately 8 percent of the total production and total value. Minnesota, Ohio, Oregon and Washington also continued as major sources of vegetables for processing.

III. DEMAND FOR VEGETABLES IN 1969

Substantial rises in the Nation's income and production were reported in 1968. This was the eighth year of the long cyclical uptrend that started in 1961, and that was interrupted briefly early in 1967. The Gross National Product (GNP) rose \$71 billion to \$861 billion in 1968 or 9 percent over 1967, according to records of the U.S. Department of Commerce. Of last year's rise in current dollar GNP, about 5 percent represented an increase in physical volume, and 3 3/4 percent, in higher prices.

Food expenditures reached an annual rate of \$101.0 billion in 1968. This compared with \$94.9 billion in 1967. Food costs in 1968 accounted for 17.2 percent of total disposable personal income, a record-low share well below the 20.9 percent estimated for 1958.

Consumer demand continues strong in the first quarter of 1969 because of rising wages and high employment levels. During 1969, personal consumption expenditures and business fixed investment are expected to produce an additional, but less rapid, expansion. Government spending for goods and services is expected to advance only slightly as a result of budget tightening. This latter action is designed to moderate the rise in prices.

The full effect of the 10 percent tax surcharge on incomes is expected to be felt this spring when taxpayers file their tax returns. However, strength in all sectors of the economy is expected to further expand economic activity and consumer income.

Increases in population and consumer income will expand domestic markets for most farm products. However, available market supplies will continue to be a primary price determining factor. The total consumption of fresh vegetables has eased downward in recent years largely because of availability of vegetables in processed form. Moving into 1969, supplies of processed vegetables are large and prices are running lower than last year.

Per capita use of fresh vegetables in 1969 will depend upon timeliness of harvest, amount of individual supplies and prices, as well as prices for substitutes. The total per capita use of principal canned vegetables is expected to show little change in 1969. But some gain is expected in total use of frozen vegetables. On a retail-weight equivalent, consumers in 1968 used 196.5 pounds of vegetables. This included 138 pounds in fresh form, 49 pounds of canned items and almost 9.5 pounds of frozen items.

IV. FOREIGN TRADE

Exports of canned asparagus to European countries declined sharply in 1967-68. These countries, particularly West Germany, generally switched to imports of canned asparagus packed in Taiwan. Most of the decline in export sales of green beans was with Mexico. West Germany, formerly a heavy purchaser of domestic canned green beans, is obtaining a substantial supply from Belgium - Luxembourg. A sharp expansion in tomato production and pack in Western Europe, particularly Portugal, has resulted in a decline in exports of canned tomatoes and tomato products. At the same time, combined imports of the

latter items have more than doubled since 1966-67 (Table 1). Most of the recent increase in imports of green peas has come from the Dominican Republic.

Exports of frozen vegetables in 1967-68 were estimated at 25.2 million pounds. This compared with 27.4 million in 1966-67. Canada and the United Kingdom were the principal destinations for the exports, with each country taking about one-third of the total. The West Indies, Australia, Sweden, and Venezuela also imported relatively large quantities of domestic frozen vegetables.

The dock strike is expected to reduce foreign trade totals for 1968-69. Competitive supplies in foreign markets are likely to increase and, as a result, check export potential for canned and frozen vegetables. At the same time, foreign vegetable processors will seek to increase their sales volume in U. S. markets.

Table 1.--Selected Canned Vegetables: Imports and exports

Commodity	Marketing Season				
	: 1967-68	: 1966-67	: 1965-66	: 1964-65	: 1963-64
	<u>1,000 cases (basis 24/303's)</u>				
<u>Imports</u>					
Peas, green <u>1/</u>	239.9	154.7	162.4	119.6	41.9
Tomatoes <u>2/</u>	6,583.7	4,647.9	4,278.8	3,453.6	3,346.5
Tomato Concentrates <u>2/</u>	7,117.1	3,211.6	1,571.7	627.0	635.6
<u>Exports</u>					
Asparagus <u>3/</u>	668.6	1,318.0	1,366.3	2,715.1	2,717.9
Beans, Green <u>2/</u>	154.0	187.0	335.5	179.2	206.3
Corn, Sweet <u>4/</u>	516.6	662.9	525.4	419.5	374.8
Peas, Green <u>1/</u>	240.7	244.9	288.1	207.7	271.1
Tomatoes <u>2/</u>	275.4	447.5	485.0	775.1	335.1
Tomato Concentrates <u>2/</u>	263.2	343.1	468.6	554.0	572.1
Tomato Juice <u>2/</u>	702.8	780.8	855.3	1,234.9	1,297.0

1/ Year beginning June 1. 2/ Year beginning July 1. 3/ Year beginning April 1. 4/ Year beginning August 1.

Source: Bureau of the Census, U. S. Department of Commerce.

V. SUPPLIES OF CANNED AND FROZEN VEGETABLES

Canned: The 1968 aggregate carryover of seven canned vegetables, lima beans, snap beans, beets, sauerkraut, sweet corn, green peas and spinach, was estimated at 45.1 million cases(basis 24/303's), according to the National Cannery Association. This aggregate carryover was 57 percent above the 1967 relatively small total of 28.8 million cases. All seven vegetables contributed to the increase in carryover, with snap beans and sweet corn accounting for most of the gain.

The 1968 combined carryover of canned tomatoes, tomato juice, catsup and chili sauce was up sharply, at 36.1 million cases versus 29.4 million in 1967. The carryover of cucumber pickles was almost double the 1967 total.

Complete data on the 1968 pack of some vegetables are not available. But available data indicate that the 1968 aggregate pack of lima beans, snap beans, beets, sauerkraut, sweet corn, green peas and spinach amounted to 185 million cases(basis 24/303's), or 4 percent more than the 1967 aggregate of 178 million. Complete pack data for 1968 processed tomatoes are not available. Nevertheless, the extremely large 1968 tonnage for processing indicates an overall pack of canned tomatoes and products approximately one-fifth above 1967. The 1968-69 pack of cucumber pickles is expected to be down moderately compared with last season.

The total supply (carryover plus pack) of principal canned vegetables available for 1968-69 utilization was estimated to be 15 percent above 1967-68. Much of the increase is concentrated in canned tomatoes, tomato products and sweet corn. Cumulative disappearance of canned vegetables this marketing season into early winter has been relatively small in contrast to the record supply available.

If disappearance totals for principal canned vegetables reflect approximately those levels recorded the past several years, the 1969 aggregate carryover of canned vegetables will be a record. The carryover of canned sweet corn, tomatoes and tomato products will be substantial. Because canned supplies will continue heavy relative to market needs, the 1969 acreage guides for all principal vegetables for canning recommend reductions in 1969 plantings.

Frozen Vegetables: The 1968 carryover of frozen lima beans, snap beans, sweet corn, green peas and spinach amounted to 363.8 million pounds, according to reports issued by the Statistical Reporting Service. A year earlier the comparable total was 261.1 million pounds.

The 1968 combined pack for five frozen vegetables is estimated at 1.36 billion pounds compared with 1.34 billion in 1967. The total supply (carryover plus pack) of the five frozen vegetables available for the 1968-69 marketing was 1.7 billion pounds versus 1.6 billion in 1967-68. On a per capita basis, the aggregate supply this season was 8.7 pounds compared with 8.2 pounds a year earlier. On January 1, 1969, aggregate frozen holdings of lima beans, snap beans, sweet corn, green peas and spinach were 936 million pounds, 9 percent above the year-earlier total of 855 million.

VI. GUIDE SUMMARY TABLES

Acreage guides for each of the principal vegetables are shown in Table 2. The total guide is 1,791,000 acres or 12 percent less than in 1968, but 5 percent above the 1963-67 average. With normal acreage losses and average yields on the acreages for harvest, total production in 1969 would be 9,297,100 tons or 21 percent less than in 1968, but 11 percent above the 1963-67 average. Details are shown in table 3, page 10.

The 1969 guide levels are substantially below 1968 because there were especially sharp increases in crop planting and production (see Figure 1).

Per capita use of selected processed vegetables is shown in Figures 2 through 5.

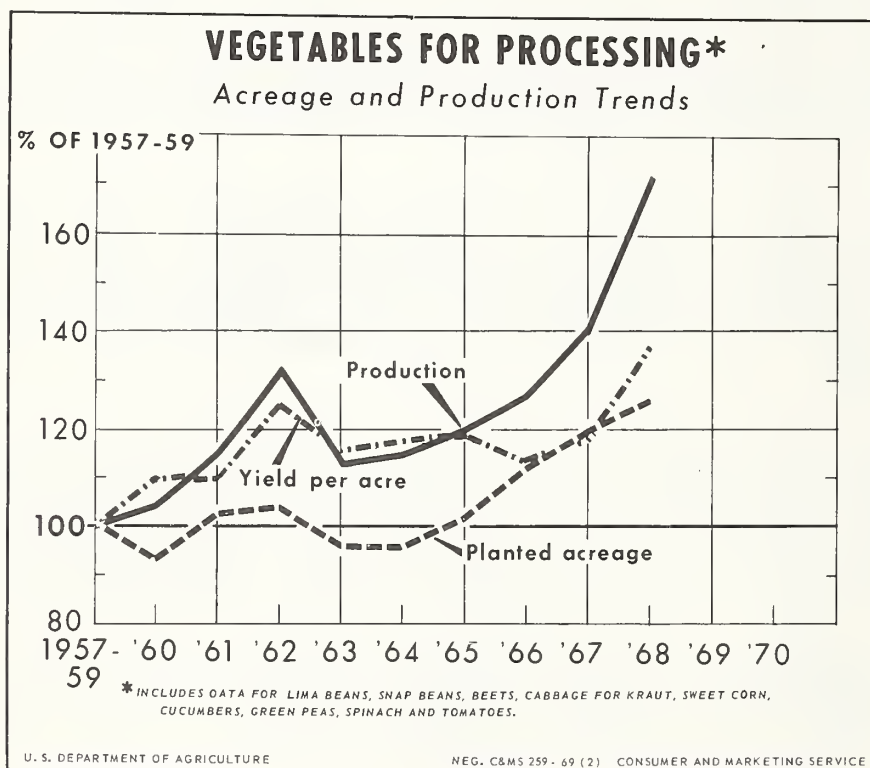


Figure 1

Table 2.--Commercial Vegetables for Processing: Acreage Guide for 1969, with comparisons

Commodity	Planted acreage				Percent Acreage Guide is of:			
	Guide	Prel.	1967	1966	Prel.	1968	1967	1966
	: 1969	: 1968	: 1967	: 1966	: 1968	: 1967	: 1967	: 1966
								Percent
								1,000 acres
Beans, Lima								
For Canning	31.0	38.7	39.9	33.6	80		78	92
For Freezing	63.6	74.8	65.6	67.4	85		97	94
Total	94.6	113.5	105.5	101.0	83		90	94
Beans, Snap								
For Canning	200.4	222.7	222.0	199.6	90		90	100
For Freezing	62.0	62.0	71.5	66.6	100		87	93
Total	262.4	284.7	293.5	266.2	92		89	99
Beets	18.7	22.0	19.5	17.7	85		96	106
Cabbage for Kraut ^{1/}								
Corn, Sweet								
For Canning	333.4	416.8	381.5	340.6	80		87	98
For Freezing	124.0	137.8	129.3	129.2	90		96	96
Total	457.4	554.6	510.8	469.8	82		90	97
Cucumbers for Pickles	151.4	159.4	165.3	146.6	95		92	103
Peas, Green								
For Canning	298.8	314.5	315.0	313.2	95		94	95
For Freezing	172.0	191.1	172.2	162.9	90		100	106
Total	470.8	505.5	487.2	476.1	93		97	99
Spinach								
For Canning	13.9	14.6	15.2	13.1	95		91	106
For Freezing	14.3	14.3	16.5	13.8	100		87	104
Total	28.2	28.9	31.7	26.9	98		89	105
Tomatoes	307.5	371.7	333.4	306.0	83		92	100
Total	1,791.0	2,040.3	1,946.9	1,810.3	88		92	99

Note: Data rounded, but percentage comparisons based on unrounded data.

^{1/} See page 22 for 1969 guide for early fall cabbage for fresh market and kraut combined.

Table 3.--Commercial Vegetables for Processing: Probable production in 1969, with comparisons

Commodity	: Probable production from Acreage									
	: Guide as percent of:					: Probable production from Acreage				
	: Prel.					: Prel.				
	1/	Guide	: 1968	: 1967	: 1966	: 1968	: 1967	: 1966	: 1967	: 1966
	Percent									
	1,000 tons									
Beans, Lima										
For Canning	27.0		31.6	35.5	28.9	85			76	93
For Freezing	73.7		81.6	80.2	75.6	90			92	97
Total	100.7		113.2	115.7	104.5	89			87	96
Beans, Snap										
For Canning	447.4		487.1	486.8	392.4	92			92	114
For Freezing	139.9		139.7	150.0	129.6	100			93	108
Total	587.3		626.8	636.8	522.0	94			92	112
Beets	211.2		269.2	206.4	193.9	78			102	109
Cabbage for Kraut 2/										
Corn, Sweet										
For Canning	1,353.9		1,786.7	1,515.6	1,361.4	76			89	99
For Freezing	567.3		691.1	586.3	601.0	82			97	94
Total	1,921.2		2,477.8	2,101.9	1,962.4	78			91	98
Cucumbers for Pickles	553.0		550.9	595.6	534.0	101			93	104
Peas, Green										
For Canning	340.7		353.8	363.2	311.2	96			94	109
For Freezing	217.7		233.0	227.3	197.8	93			96	110
Total	558.4		586.9	590.6	509.0	95			95	110
Spinach										
For Canning	69.6		69.2	71.6	71.0	101			97	98
For Freezing	77.2		87.0	85.5	74.9	89			90	103
Total	146.8		156.2	157.0	145.9	94			94	101
Tomatoes	5,218.5		6,967.6	5,187.4	4,660.6	75			101	112
Total	9,297.1		11,748.6	9,591.4	8,632.3	79			97	108

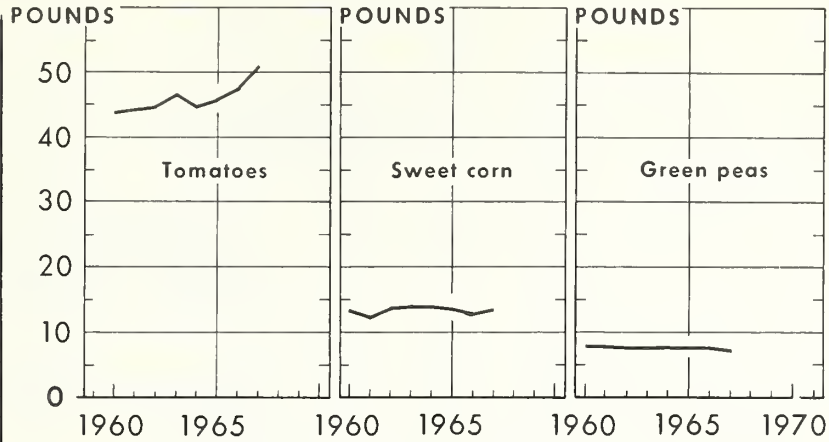
Note: Data rounded.

1/ Computed: Acreage for 1969, times average yield.

2/ See page 22 for 1969 guide for early fall cabbage for fresh market and kraut combined.

MAJOR CANNED VEGETABLES

Per Capita Consumption*



*CIVILIAN CONSUMPTION ON FRESH EQUIVALENT BASIS.

SOURCE OF DATA: REPORTS OF THE ECONOMIC RESEARCH SERVICE

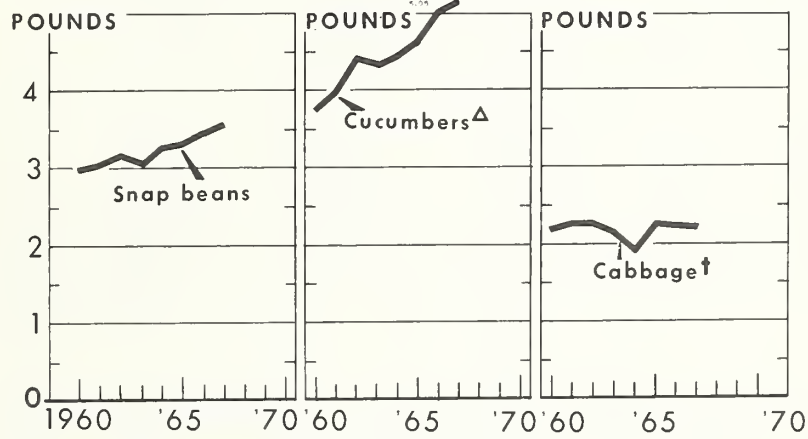
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Figure 2

SELECTED CANNED VEGETABLES

Per Capita Consumption*



△ PICKLES, CANNED AND BULK.

† SAUERKRAUT, CANNED AND BULK.

*CIVILIAN CONSUMPTION ON FRESH EQUIVALENT BASIS.

SOURCE: ECONOMIC RESEARCH SERVICE.

U. S. DEPARTMENT OF AGRICULTURE

NEG. C&MS 260-69 (2) CONSUMER AND MARKETING SERVICE

Figure 3

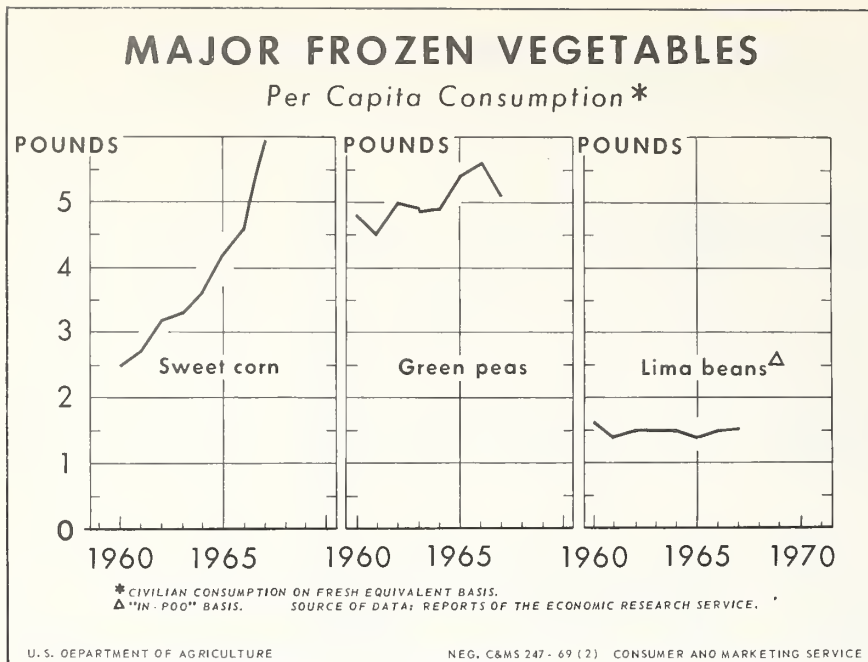


Figure 4

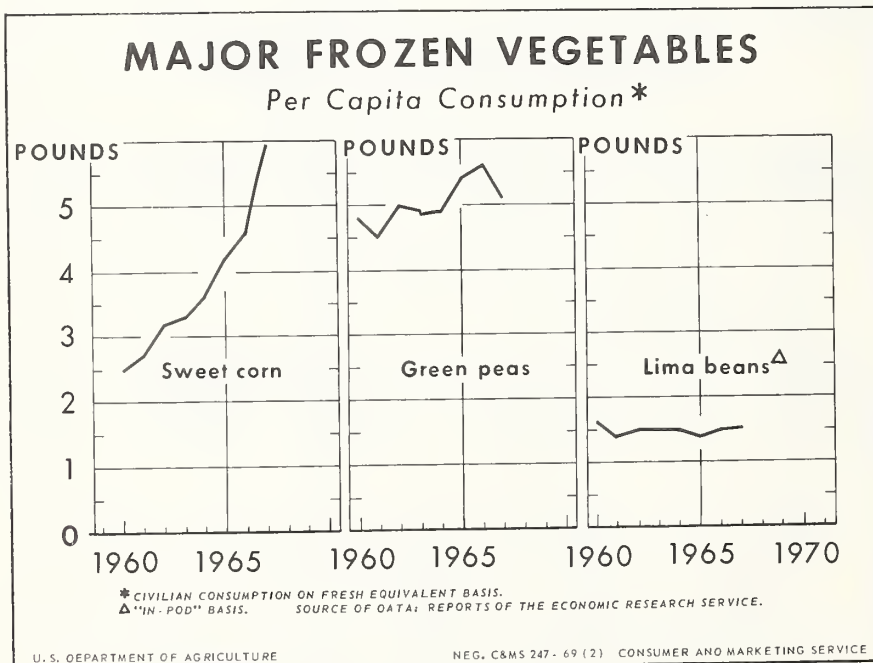


Figure 5

1969 Acreage-Marketing Guides
Vegetables for Commercial Processing

Lima Beans

Year	: Acreage :		Yield :	:	:	:
	:Planted:	For harvest:	per acre	:Production:	Price :	Value
	(1,000 acres)		(tons)	(1,000 tons)	(\$ per ton)	(\$1,000)
1969 Planted Acreage Guide and probable production						
Canning (acreage 20 percent less than in 1968)	31.0		<u>1/</u> .92	27.0		
Freezing (acreage 15 percent less than 1968)	<u>63.6</u>		<u>1/</u> 1.22	<u>73.7</u>		
Total	94.6			100.7		
<u>Background statistics</u>						
<u>Canning</u>						
1968	38.7	37.0	.85	31.6	166.34	5,253
1967	39.9	36.4	.98	35.5	164.28	5,832
1966	33.6	32.0	.90	28.9	151.06	4,361
1965	28.4	25.4	.95	24.1	153.56	3,707
<u>Freezing</u>						
1968	74.8	70.8	1.15	81.6	202.83	16,559
1967	65.6	60.9	1.32	80.2	183.47	14,711
1966	67.4	64.9	1.16	75.6	183.08	13,837
1965	61.8	58.6	1.23	72.3	184.50	13,341
<u>Total</u>						
1968	113.5	107.8	1.05	113.2	192.65	21,812
1967	105.5	97.3	1.19	115.7	177.58	20,543
1966	101.0	96.9	1.08	104.5	174.23	18,198
1965	90.2	84.0	1.15	96.4	176.75	17,048

1/ 1965-68 average yield.

Comments

The total acreage of lima beans for processing in 1968 was substantially larger than in 1967. An increase in the acreage for freezing more than offset a decrease in acreage for canning.

Crops were delayed several weeks by cool, wet spring weather. Later on in the East, hot, dry weather curtailed yields. In Washington, excessive August rains resulted in a sharply reduced yield.

Production of lima beans for canning in 1968 was 11 percent less than in 1967. This offset a 2-percent increase in output for freezing, and total 1968 production for processing was slightly less than a year earlier.

Canned Lima Beans (see Figure 6)

Carryover stocks of lima beans in 1968 were nearly twice as large as in 1967. Although the 1968 pack was moderately less than in 1967, the total supply, carryover plus pack, for 1968-69 was 12 percent more than in 1967-68. In the fall and winter of 1968-69, canned lima bean prices were slightly below the high levels reported the two previous years. Responding to lower prices, canners' shipments increased compared with a year earlier. The total disappearance for 1968-69 may be slightly to moderately larger than in the previous season. However, 1969 carryover stocks are expected to be larger than in 1968. Consequently, a reduction is recommended in 1969 production for canning.

1969 Guide - Canning

The 1969 guide is a planted acreage 20 percent less than in 1968. Such an acreage, with normal abandonment and a 1965-68 average yield, will result in a production 15 percent less than in 1968.

Frozen Lima Beans

The 1968-69 total supply, carryover plus pack, of frozen lima beans was a record and 13 percent above 1967-68 (see Figure 7). The cumulative disappearance of frozen lima beans into the winter of 1968-69 has been at a high rate. Nevertheless, the carryover in 1969 will likely be much larger than in 1968. As a result, a 1969 production smaller than in 1968 will be adequate for frozen pack requirements.

1969 Guide - Freezing

The 1969 guide is a planted acreage 15 percent less than in 1968. Such an acreage, with normal abandonment and a 1965-68 average yield, will result in a production 10 percent less than in 1968.

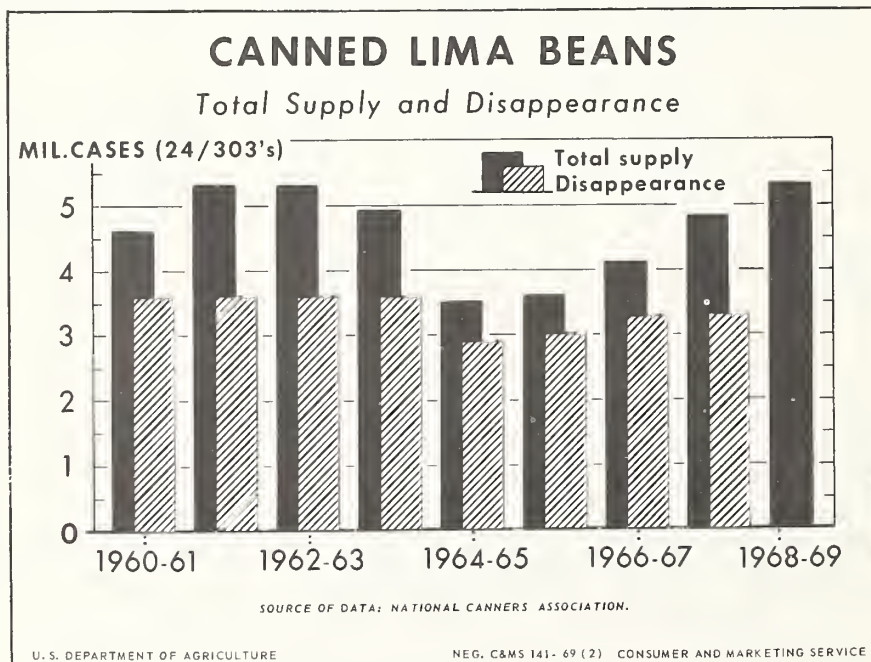


Figure 6

Supply and Disappearance of Processed Lima Beans

Commodity :	Marketing Season				
	: 1968-69	: 1967-68	: 1966-67	: 1965-66	: 1964-65

Canned Lima Beans

Million cases (basis 24/303's)

Carryover	1.5	.8	.6	.6	1.3
Pack	3.8	4.0	3.5	3.0	2.2
Total Supply	5.3	4.8	4.1	3.6	3.5
Disappearance	N.A.	3.3	3.3	3.0	2.9
Carryover	N.A.	1.5	.8	.6	.6

Frozen Lima Beans

Million pounds

Carryover	50.7	31.6	24.7	24.9	47.0
Pack	167.4	161.3	151.9	145.5	116.5
Total Supply	218.1	192.9	176.6	170.4	163.5
Disappearance	N.A.	142.2	145.0	145.7	138.6
Carryover	N.A.	50.7	31.6	24.7	24.9

N.A.- not available.

Sources: National Canners Association; Bureau of the Census, U.S. Department of Commerce; National Association of Frozen Food Packers; and Statistical Reporting Service, USDA.

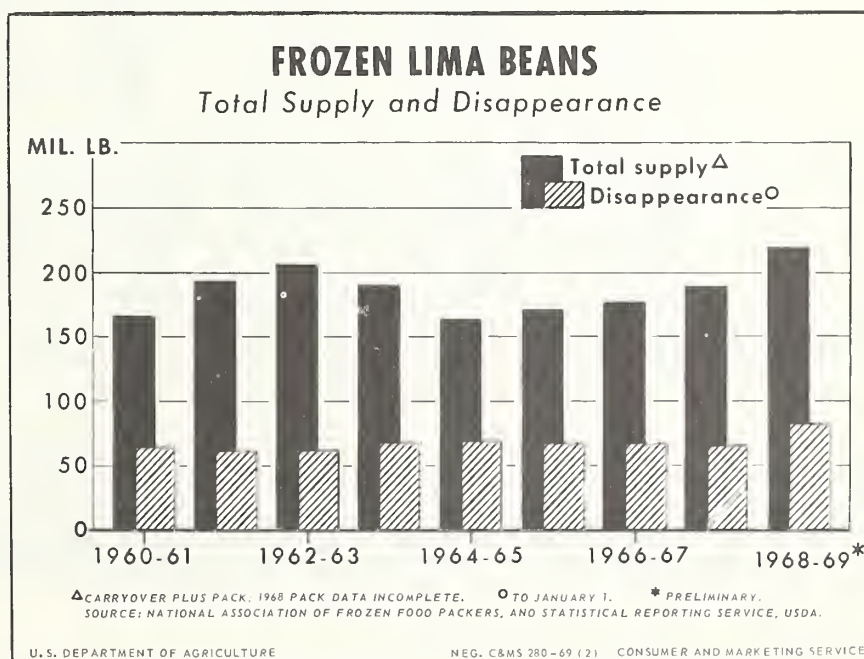


Figure 7

1969 Acreage-Marketing Guides
Vegetables for Commercial Processing

Snap Beans

Year	: Acreage :	Yield :	:	:
	:Planted:For harvest:	per acre	:Production:	Price : Value
	(1,000 acres)	(tons)	(1,000 tons)	(\$ per (\$1,000 ton)

1969 Planted Acreage Guide
and probable production

Canning (acreage 10 percent
less than in 1968) 200.4

1/ 2.4

447.4

Freezing (acreage equal
to 1968) 62.0
Total 262.4

1/ 2.4

139.9
587.3

Background statistics

Canning

1968	222.7	207.2	2.4	487.1	98.96	48,199
1967	222.0	208.5	2.3	486.8	98.82	48,110
1966	199.6	183.1	2.1	392.4	97.92	38,420
1965	192.9	178.8	2.4	424.7	94.08	39,958

Freezing

1968	62.0	58.9	2.4	139.7	102.92	14,381
1967	71.5	65.6	2.3	150.0	110.80	16,616
1966	66.6	62.4	2.1	129.6	109.58	14,198
1965	53.6	51.9	2.2	116.0	105.96	12,286

Total

1968	284.7	266.1	2.4	626.8	99.84	62,580
1967	293.5	274.0	2.3	636.8	101.64	64,726
1966	266.2	245.5	2.1	522.0	100.82	52,618
1965	246.5	230.7	2.3	540.7	96.63	52,244

1/ 1967-68 average yield.

Comments

The long-term upward trend in the acreage of snap beans for processing was interrupted in 1968 by a 13-percent decrease in the acreage for freezing, which was at a high level in 1967. There was a fractionally larger acreage for canning, which accounted for nearly four-fifths of the 1968 total acreage for processing.

Growing conditions for snap beans varied considerably in 1968. The crop in the East and Midwest, as well as in some western and southern areas, was restricted by cool, wet spring weather. During August, vines in several areas were adversely affected by hot, dry weather. In the West, heavy rains in late August and early September slowed growth and interrupted harvest. Nevertheless,

the U.S. 1968 average yield exceeded 1967.

The 1968 total production for processing was slightly less than the record-large 1967 crop. Production for freezing was down 7 percent compared with 1967, but production for canning was about equal to the previous year. As a result of a 4-percent increase in production in Oregon, the leading State, output in the West was moderately larger than in 1967. In the Midwest, production was close to that in 1967, but output in the East was down substantially.

Snap Beans - Canned

The 1968 carryover of canned snap beans was a record, and almost double that in 1967. The 1968 pack was extremely large. As a result, the 1968-69 total supply, carryover plus pack, was a record and a tenth more than in 1967-68 (see Figure 8).

Despite the larger supplies this season, prices for most styles of canned snap beans are close to the relatively firm levels recorded in 1967-68. Into the mid-winter of 1968-69, the cumulative disappearance of canners' stocks of snap beans was 5 percent above the 1967-68 volume. Assuming a normal rate of sales during the remainder of the 1968-69 season, the 1969 carryover of canned snap beans is expected to be quite high. Therefore, a substantial reduction is recommended in 1969 production for canning.

1969 Guide - Canning

The 1969 guide is a planted acreage 10 percent less than in 1968. Such an acreage, with normal abandonment and a 1967-68 average yield, will result in a production 8 percent less than in 1968.

Snap Beans - Frozen

The 1968 carryover of frozen snap beans was nearly two-thirds more than in 1967. This large carryover was about offset by a 13-percent reduction in the 1968 pack compared with 1967. Therefore, total supply available for 1968-69 marketing was nearly equal to that in 1967-68 (see Figure 9).

Prices of frozen snap beans this season have been slightly below 1967-68. As a result, disappearance of frozen snap beans this season has been at a high rate, and the 1969 carryover is expected to be in balance with market needs. An equal acreage of snap beans for freezing is recommended for 1969.

1969 Guide - Freezing

The 1969 guide is a planted acreage equal to 1968. Such an acreage, with normal abandonment and a 1967-68 average yield, will result in a production about equal to 1968.

Supply and Disappearance of Processed Snap Beans

Commodity	Marketing Season				
	1968-69	1967-68	1966-67	1965-66	1964-65

Canned Snap Beans

Million cases (basis 24/303's)

Carryover	15.1	7.8	10.4	7.1	9.3
Pack	51.8	53.2	40.5	45.6	37.4
Total Supply	66.9	61.0	50.9	52.7	46.7
Disappearance	N.A.	45.9	43.1	42.3	39.6
Carryover	N.A.	15.1	7.8	10.4	7.1

Frozen Snap Beans

Million pounds

Carryover	78.7	48.2	40.6	52.1	50.8
Pack	<u>1/</u> 209.0	238.3	231.8	189.5	187.5
Total Supply	287.7	286.5	272.4	241.6	238.2
Disappearance	N.A.	207.8	224.2	201.0	186.1
Carryover	N.A.	78.7	48.2	40.6	52.1

N.A. - Not available.

1/ Includes an estimate for Italian green beans.

Sources: National Cannery Association; Bureau of the Census, U.S. Department of Commerce; National Association of Frozen Food Packers; and Statistical Reporting Service, USDA.

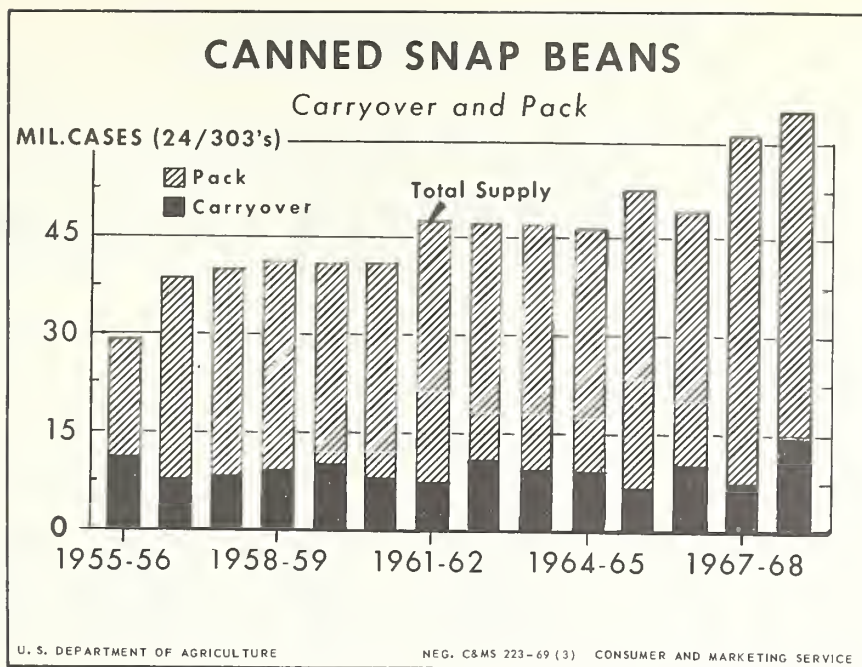


Figure 8

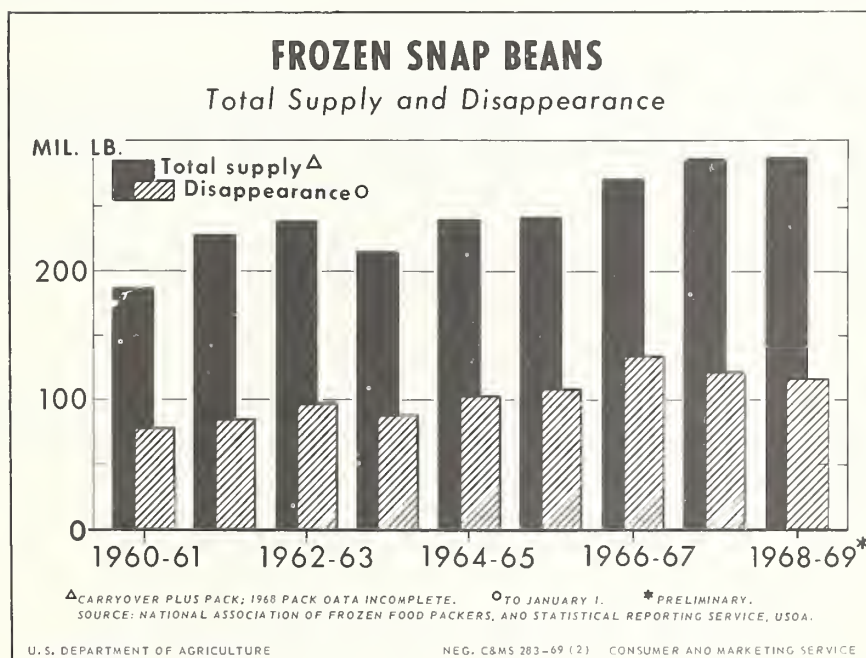


Figure 9

1969 Acreage-Marketing Guides
Vegetables for Commercial Processing

Beets

Year	: Acreage :	Yield :	:	:	:
	:Planted:For harvest:	per acre	:Production:	Price	: Value
	(1,000 acres)	(Tons)	(1,000 tons)	(\$ per ton)	(\$1,000)

1969 Planted Acreage Guide
and probable production

Canning (acreage 15 percent less than in 1968)	18.7	1/ 12.0	211.2
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Background statistics

Canning

1968	22.0	21.2	12.7	269.2	21.92	5,900
1967	19.5	17.6	11.7	206.4	20.48	4,226
1966	17.7	17.0	11.4	193.9	19.98	3,874
1965	15.7	14.5	12.3	178.5	18.32	3,271

1/ 1965-68 average yield.

Comments

The 1968 production of beets for canning was a record and 30 percent above 1967. The crops in Wisconsin, New York and Oregon, the principal sources, were much larger than the previous year.

The 1968 carryover of beets was moderate. However, a record pack during the last half of 1968 boosted the 1968-69 total supply sharply above the moderate inventory estimated for the previous season. Despite this high inventory, prices for canned beets during the current season have been firm.

The 1969 carryover of canned beets is expected to be large. Therefore, a reduction is recommended in the 1969 crop for processing.

1969 Guide

The 1969 guide is a planted acreage 15 percent less than in 1968. Such an acreage, with normal abandonment and a 1965-68 average yield, will result in a production 22 percent less than in 1968.

Supply and Disappearance of Canned Beets

Commodity	Marketing Season				
	1968-69	1967-68	1966-67	1965-66	1964-65

Canned Beets	Million cases (basis 24/303's)				
Carryover	3.6	3.3	3.2	4.7	5.8
Pack 1/	2/14.0	11.8	11.4	10.0	10.2
Total Supply	17.6	15.1	14.6	14.7	16.0
Disappearance	N.A.	11.5	11.3	11.5	11.3
Carryover	N.A.	3.6	3.3	3.2	4.7

N.A. - Not available.

1/ July 1 - June 30 basis.

2/ Partially estimated.

Sources: National Cannery Association; Bureau of the Census, U.S. Department of Commerce; and Statistical Reporting Service, USDA.

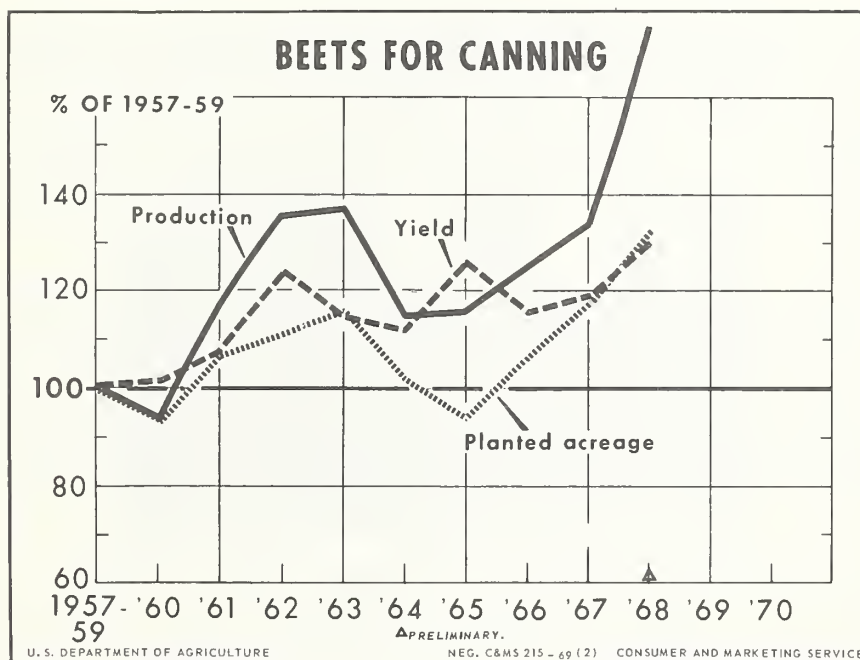


Figure 10

1969 Acreage-Marketing Guides
Vegetables for Commercial Processing

Cabbage - Early Fall
(Fresh Market and Processing)

Year	Acreage		Yield			
	Planted	For harvest	per acre	Production	Price	Value
	(Acres)		(Cwt.)	(1,000 cwt.)	(\$ per cwt.)	(\$1,000)
1969 Planted Acreage Guide and probable production (acreage equal to 1968)	30,630		1/ 311	9,049		
<u>Background statistics</u>						
<u>Canning</u>						
1968	30,630	29,380	304	3/ 8,946	2.01	17,492
1967	32,110	30,510	318	3/ 9,713	1.60	14,669
1966	30,900	29,000	261	3/ 7,555	2.96	21,946
1965 2/	33,880	31,980	288	3/ 9,203	1.53	13,394

1/ 1967-68 average yield.

2/ Excludes Utah.

3/ Includes the following quantities (in 1,000 cwt.) not marketed and excluded in computing value: 242 in 1968, 534 in 1967, and 148 in 1966, and 465 in 1965.

Comments

Following low prices for 1967 sales, the 1968 planted acreage of early fall cabbage for fresh market and processing was reduced. In Upstate New York, acreage was only slightly below a year earlier, but in Ohio and in Wisconsin, plantings were nearly a tenth smaller. With a much larger carryover of sauerkraut in prospect, the contract acreage, which in 1967 accounted for four-fifths of the total for processing, was reduced slightly in 1968 compared with 1967.

In 1968, frequent rains delayed transplanting and damaged some stands in Upstate New York, Pennsylvania, Michigan, and Wisconsin. In addition, throughout the northern-tier States, cool weather followed by hot, dry weather adversely affected cabbage growth. Later in the season, the warm weather, particularly in New York, hindered sizing. Also, there was some crop loss in Wisconsin after heavy fall rains. Yields in the larger producing States in the East and Midwest ranged from slightly to substantially smaller than a year ago. Total early fall production in 1968 was 8 percent less than in 1967.

The 1968 carryover of sauerkraut was almost double the small inventory reported in 1967. To offset the heavy carryover, packers reduced 1968-69 cuttings substantially compared with a year earlier. In contrast with a larger inventory on December 1 (see Figure 11), by February 1969, packers' total stocks had declined to a level substantially below a year earlier. Prices for sauerkraut firmed in the mid-winter of 1968-69 and were moderately above the previous year.

The 1969 carryover of sauerkraut likely will be in balance with market potential. With average yields in 1969, an equal acreage should provide an adequate tonnage for the 1969 pack.

1969 Guide

The 1969 guide is a planted acreage equal to 1968. Such an acreage, with normal abandonment and a 1967-68 average yield, will result in a production 1 percent more than in 1968.

Supply and Disappearance of Sauerkraut

Commodity	Marketing Season				
	: 1968-69	: 1967-68	: 1966-67	: 1965-66	: 1964-65

Sauerkraut

Million cases (basis 24/303's)

Carryover	4.0	2.3	3.1	2.7	4.3
Pack	N.A.	14.5	10.4	12.1	8.4
Total Supply	N.A.	16.8	13.6	15.8	12.6
Disappearance	N.A.	12.8	11.3	12.7	9.9
Carryover	N.A.	4.0	2.3	3.1	2.7

Source: National Kraut Packers Association, and Bureau of the Census, U.S. Department of Commerce.

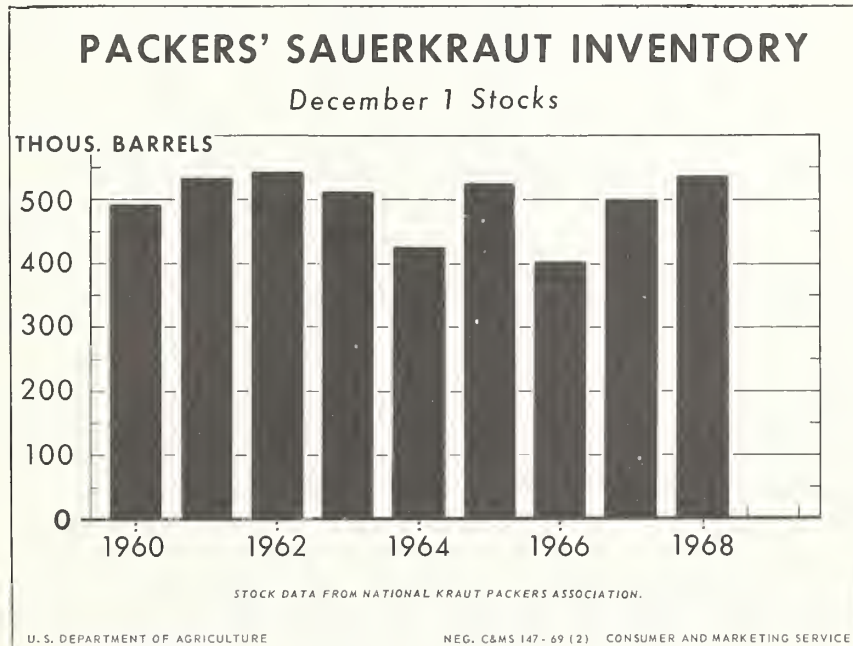


Figure 11

1969 Acreage-Marketing Guides
Vegetables for Commercial Processing

Sweet Corn

Year	Acreage		Yield			
	Planted	For Harvest	per acre	Production	Price	Value
	(1,000 acres)		(tons)	(1,000 tons)	(\$ per ton)	(\$1,000)
<u>1969 Planted Acreage Guide and probable production</u>						
Canning (acreage 20 percent less than in 1968)	333.4		<u>1/</u> 4.32	1,353.9		
Freezing (acreage 10 percent less than in 1968)	124.0		<u>1/</u> 4.92	567.3		
Total	457.4			1,921.2		
<u>Background statistics</u>						
<u>Canning</u>						
1968	416.8	393.6	4.54	1,786.7	24.38	43,566
1967	381.5	352.6	4.30	1,515.6	23.64	35,833
1966	340.6	323.8	4.20	1,361.4	21.83	29,717
1965	323.0	277.3	4.26	1,181.0	21.76	25,703
<u>Freezing</u>						
1968	137.8	127.1	5.44	691.1	28.70	19,838
1967	129.3	118.0	4.97	586.3	28.50	16,708
1966	129.2	121.8	4.93	601.0	24.83	14,920
1965	107.6	99.4	4.35	432.6	24.17	10,456
<u>Total</u>						
1968	554.6	520.8	4.76	2,477.8	25.59	63,402
1967	510.8	470.6	4.47	2,101.9	25.00	52,541
1966	469.8	445.6	4.40	1,962.4	22.75	44,637
1965	430.6	376.7	4.28	1,613.6	22.41	36,159
<u>1/ 1965-68 average yield.</u>						

Comments

Total production in 1968 was a record--18 percent above 1967. In Minnesota and Wisconsin, where much of the crop is canned, the combined production was up sharply compared with a year earlier, and 71 percent above average. These two States' combined production accounted for 47 percent of the U. S. 1968 total crop. In 1968, aggregate production in Idaho, Washington, and Oregon, where much of the crop is used by freezers, was almost double the 1962-66 average; the western output accounted for 30 percent of the U. S. crop. The combined production in New York, Pennsylvania, Delaware, and Maryland, was 10 percent less than in 1967.

Total production for both canning and freezing in 1968 was 18 percent above 1967. Almost three-fourths of the crop was canned, about the usual share, and one-fourth was frozen. The 1968 sweet corn crop value at the "packing-house door" was \$63.4 million, and up \$11 million from 1967. Additional details are shown in Figures 12, 13, and 14.

Canned Sweet Corn

During the 1960's, the annual pack of sweet corn has shown substantial year-to-year changes, with an average change of 12 percent. At the same time, the annual total disappearance of canned sweet corn has continued in a relatively narrow range.

The 1968 sweet corn pack was a record and 20 percent above 1967. The record pack combined with an extremely large carryover resulted in a 1968-69 total supply of 67.3 million cases (basis 24/303's), or 13.5 million cases above 1967-68. Cumulative disappearance of canned sweet corn this season is up a little compared with the year-earlier total. However, the 1969 carryover of canned sweet corn will be extremely large. Therefore, a substantial reduction is recommended in 1969 production for canning.

1969 Guide - Canning

The 1969 guide for canning is an acreage 20 percent less than in 1968. Such an acreage, with normal abandonment and a 1965-68 average yield, will result in a production 24 percent less than in 1968.

Frozen Sweet Corn

Total disappearance of frozen sweet corn has shown a sharp uptrend during the 1960's. Although total disappearance last season, 1967-68, was a record, the 1968 carryover was high, and accentuated the record 1968 pack indicated at 390 million pounds (cut corn and corn-on-cob combined). The total supply for 1968-69 was 13 percent above 1967-68.

The current inventory of the frozen product is record high. However, to date there has been no unusual price weakness for frozen sweet corn in institutional and retail markets. Even though 1968-69 total disappearance should climb to a record and well above a year earlier, the 1969 carryover of frozen corn is expected to be extremely heavy. Therefore, curtailment in output is recommended for the 1969 production for freezing.

1969 Guide - Freezing

The 1969 guide is a planted acreage 10 percent less than in 1968. Such an acreage, with normal abandonment and a 1965-68 average yield, will result in a production 18 percent less than in 1968.

Supply and Disappearance of Processed Sweet Corn

Commodity	Marketing Season				
	1968-69	1967-68	1966-67	1965-66	1964-65

Canned Sweet Corn

Million cases (basis 24/303's)

Carryover	8.0	4.5	4.1	6.3	11.5
Pack	59.3	49.3	45.5	39.1	37.6
Total Supply	67.3	53.8	49.6	45.4	49.0
Disappearance	N. A.	45.8	45.1	41.3	42.8
Carryover	N. A.	8.0	4.5	4.1	6.3

Frozen Sweet Corn

Million pounds

Carryover	67.7	46.1	30.1	21.4	39.5
Pack	1/ 390.0	360.1	344.4	262.5	187.6
Total Supply	457.7	406.2	374.5	283.9	227.1
Disappearance	N. A.	338.5	328.4	253.8	205.7
Carryover	N. A.	67.7	46.1	30.1	21.4

N. A. - Not available

1/ Includes an estimate for corn-on-cob.

Source: National Canners Association; Bureau of the Census, U. S. Department of Commerce; National Association of Frozen Food Packers; and Statistical Reporting Service, USDA.

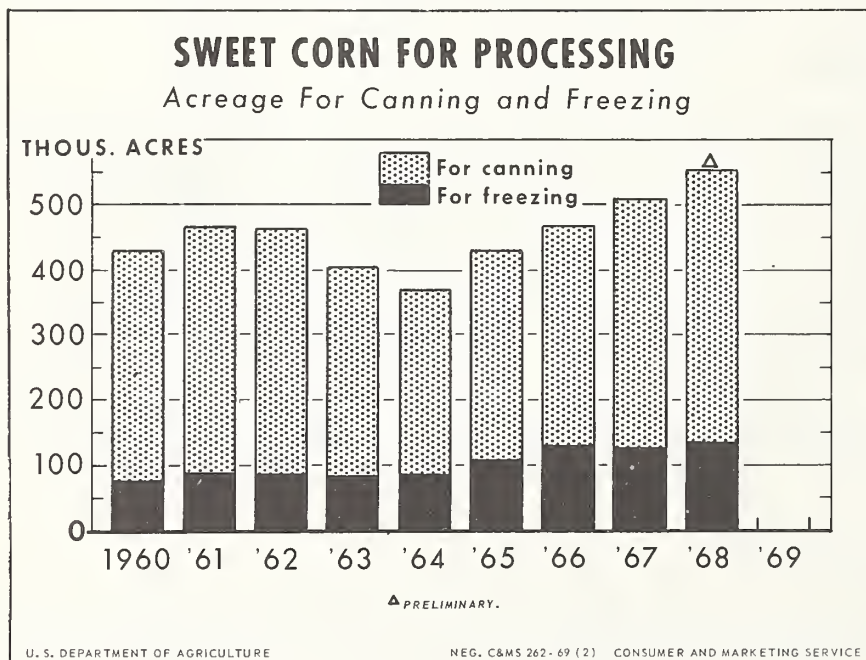


Figure 12

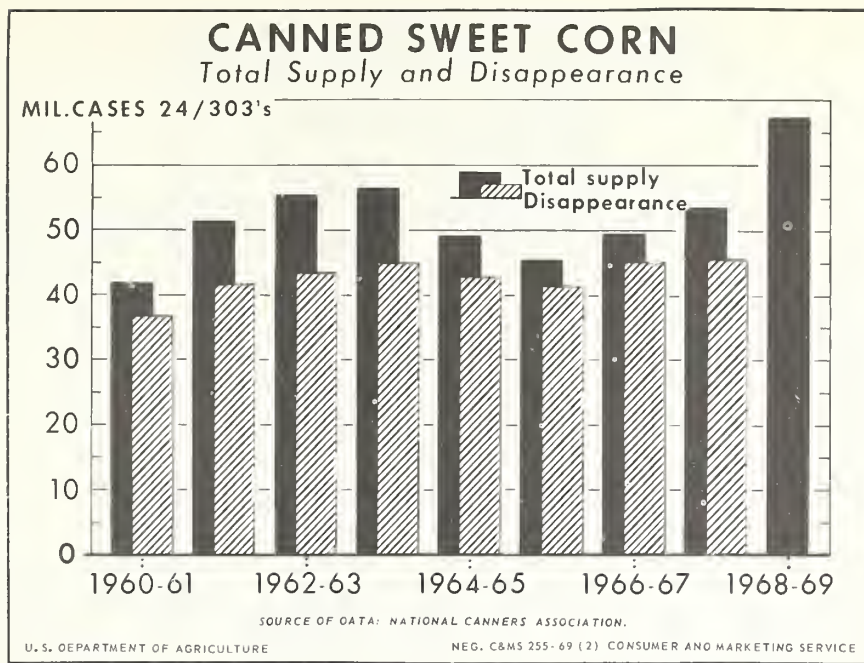


Figure 13

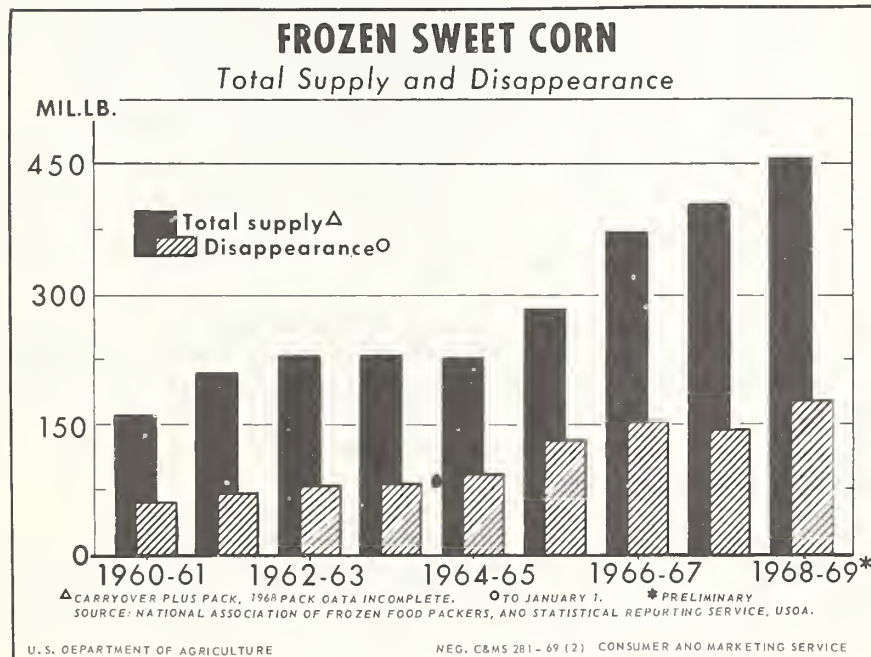


Figure 14

1969 Acreage-Marketing Guides
Vegetables for Commercial Processing

Cucumbers for Pickles

Year	: Acreage :		Yield :	:	:	:
	:Planted:	For harvest:	Per acre :	Production:	Price :	Value
	(1,000 acres)		(tons)	(1,000 tons)	(\$ per(\$1,000	ton)
<u>1969 Planted Acreage Guide</u> <u>and probable production</u> (acreage 5 percent less than in 1968)						
	151.4		<u>1</u> /3.97	553.0		
<u>Background statistics</u>						
1968	159.4	144.3	3.82	550.9	92.85	51,152
1967	165.3	154.7	3.85	595.6	91.19	54,315
1966	146.6	129.6	4.12	534.0	82.22	43,901
1965	114.4	107.6	4.10	2/441.6	75.99	32,517

1/ 1965-68 average yield.

2/ Includes 13,630 tons not marketed and excluded in computing value.

Comments

The total acreage of cucumbers for processing in 1968 was moderately less than the 1967 record. Most of the reduction occurred in the South. A substantial increase in Wisconsin plantings in 1968 largely offset a reduction in Michigan. Acreage in the West continued to trend upward in 1968, with gains in Colorado, California, and Washington.

Adverse weather limited yields and total production in 1968 was 8 percent less than the record output in 1967. Despite a much larger crop in Wisconsin, production in the northern States was moderately below 1967. The tonnage in the South was down substantially. In the West, production was slightly more than a year earlier.

The upward trend in the total supply and disappearance of cucumber pickles continued in 1967-68 (see Figure 15). On October 1, 1968, the stocks of pickles were almost double the moderate total a year earlier. The increase in carryover more than offset the decrease in 1968 production compared with 1967. And the 1968-69 total supply, carryover plus production, was up slightly from the previous year.

Although the 1968-69 total disappearance likely will be high, the 1969 carryover of cucumber pickles is expected to be substantial. Therefore, a moderate reduction is recommended in the 1969 acreage of cucumbers for processing.

1969 Guide

The 1969 guide is a planted acreage 5 percent less than in 1968. Such an acreage, with normal abandonment and a 1965-68 average yield, will result in a production slightly above 1968.

Supply and Disappearance of Pickles

Commodity	Marketing Season				
	1968-69	1967-68	1966-67	1965-66	1964-65
	1,000 tons				
October 1 Stocks	107.4	57.7	37.1	71.5	77.6
Production	550.9	595.6	534.0	<u>1/</u> 441.6	425.8
Total Supply	658.3	653.3	571.1	513.1	503.4
Disappearance	N.A.	545.9	517.7	476.0	431.9

N. A. -Not available.

1/ Includes 13,630 tons not marketed.

Source: Statistical Reporting Service, USDA.

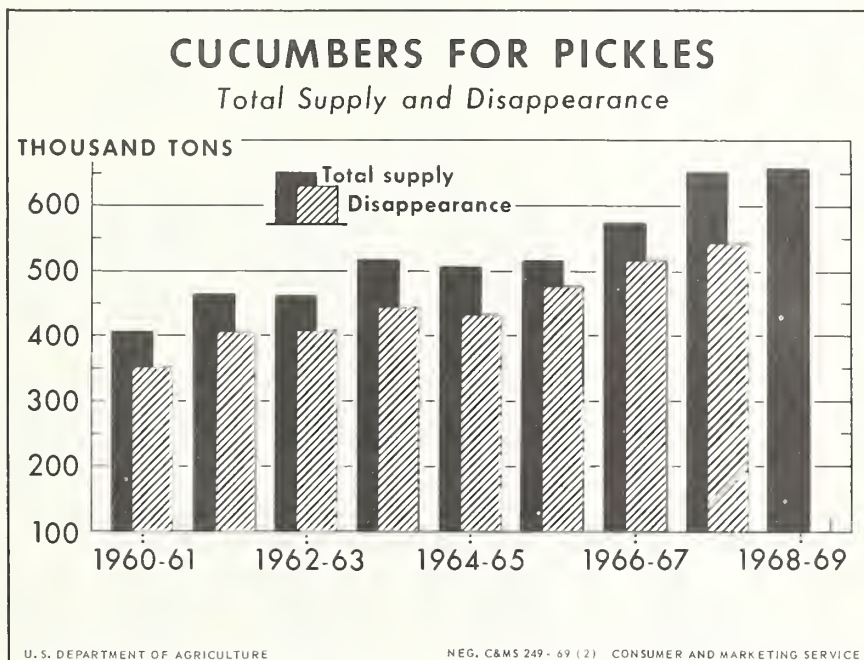


Figure 15

1969 Acreage-Marketing Guides
Vegetables for Commercial Processing

Green Peas

Year	: Acreage :	Yield :	:	:
	:Planted:For harvest:	per acre :	Production:	Price : Value
	(1,000 acres)	(tons)	(1,000 tons)	(\$ per (\$1,000 ton)

1969 Planted Acreage Guide
and probable production

Canning (acreage 5 percent
less than 1968) 298.8

1/1.226

340.7

Freezing (acreage 10 percent
less than in 1968) 172.0

1/1.376

217.7

Total 470.8

558.4

Background statistics

Canning

1968	314.5	286.5	1.235	353.8	109.13	38,615
1967	315.0	298.4	1.218	363.2	111.28	40,422
1966	313.2	284.4	1.094	311.2	108.39	33,735
1965	293.8	281.9	1.306	368.2	99.95	36,797

Freezing

1968	191.1	171.5	1.358	233.0	103.57	24,137
1967	172.2	159.8	1.394	227.3	104.92	23,852
1966	162.9	149.7	1.322	197.8	98.50	19,488
1965	168.7	159.8	1.463	233.7	99.53	23,265

Total

1968	505.5	458.0	1.282	586.9	106.92	62,752
1967	487.2	458.2	1.289	590.6	108.84	64,274
1966	476.1	434.1	1.173	509.0	104.54	53,223
1965	462.5	441.7	1.363	601.9	99.79	60,062

1/ 1967-68 average yield.

Comments

Green pea acreage for freezing was increased substantially in 1968, but that for canning was trimmed slightly. Most of the increase in acreage was concentrated in Wisconsin, the leading source, and in the West.

Adverse weather limited yield per acre in Wisconsin, Oregon, and Washington, the latter second in rank among the States in production. In the East and in Minnesota, yield levels were quite high.

The total production in 1968 was down slightly compared with 1968, but was well above average. A moderately larger production for freezing was more than offset by a reduction in tonnage for canning. Output in Wisconsin was

slightly above 1967, but production in Washington was down 9 percent, and in Oregon, 30 percent. Production in both Maryland and California was much above a year earlier.

Canned Green Peas

The 1968 carryover of canned green peas was above average, and more than offset the slight decrease in the 1968 pack compared with 1967. The total supply for 1968-69 (see Figure 16), was 46.1 million cases (basis 24/303's), compared with 44.8 million in the previous season. The cumulative shipments of canned green peas into the late winter this season are slightly above the amount indicated in the comparable period of 1967-68. During 1968-69, prices for canned peas have held about steady, and about equal to the previous season.

The 1969 carryover of canned green peas is expected to be relatively large. Therefore, a moderate reduction is recommended in the 1969 total acreage for canning.

1969 Guide - Canning

The 1969 guide is a planted acreage 5 percent less than in 1968. Such an acreage, with normal abandonment and a 1967-68 average yield, will result in a production 4 percent less than in 1968.

Frozen Green Peas

The 1968 carryover of frozen green peas was a record, and the 1968 pack was the largest since the 1965 record. The 1968-69 total supply, carryover plus pack, was a record and 6 percent above 1967-68 (see Figure 17).

Into midwinter, 1968-69, prices for frozen green peas were slightly below those in the previous winter, and the cumulative disappearance has been slightly higher. But prospects are that the 1969 carryover will be large. Therefore, a moderate reduction is recommended in 1969 output for freezing.

1969 Guide - Freezing

The 1969 guide is a planted acreage 10 percent less than in 1968. Such an acreage, with normal abandonment and a 1967-68 average yield, will result in a production 7 percent less than in 1968.

Supply and Disappearance of Processed Green Peas

Commodity	Marketing Season				
	: 1968-69	: 1967-68	: 1966-67	: 1965-66	: 1964-65
<u>Canned Green Peas</u>		<u>Million cases (basis 24/303's)</u>			
Carryover	9.9	7.1	8.8	5.9	8.0
Pack	36.2	37.7	31.9	37.6	30.0
Total Supply	46.1	44.8	40.6	43.5	38.0
Disappearance	N.A.	34.9	33.5	34.7	32.1
Carryover	N.A.	9.9	7.1	8.8	5.9
<u>Frozen Green Peas</u>		<u>Million pounds</u>			
Carryover	124.3	100.5	115.0	97.5	100.7
Pack	430.9	424.2	375.4	443.3	336.9
Total Supply	555.2	524.7	490.3	540.8	437.6
Disappearance	N.A.	400.4	389.8	425.8	340.1
Carryover	N.A.	124.3	100.5	115.0	97.5

N.A. - Not available.

Sources: National Cannery Association; National Association of Frozen Food Packers; Bureau of the Census, U.S. Department of Commerce; and the Statistical Reporting Service, USDA.

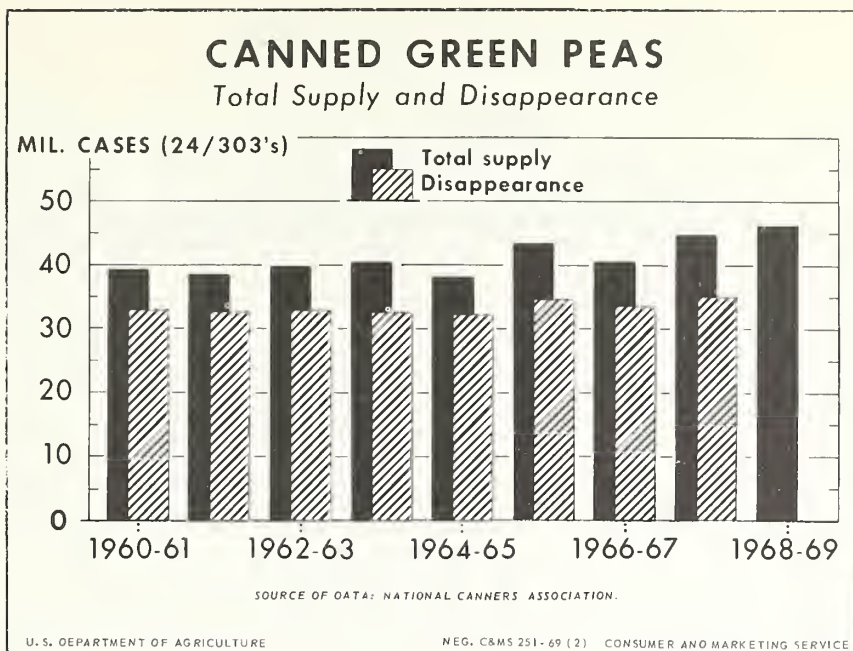


Figure 16

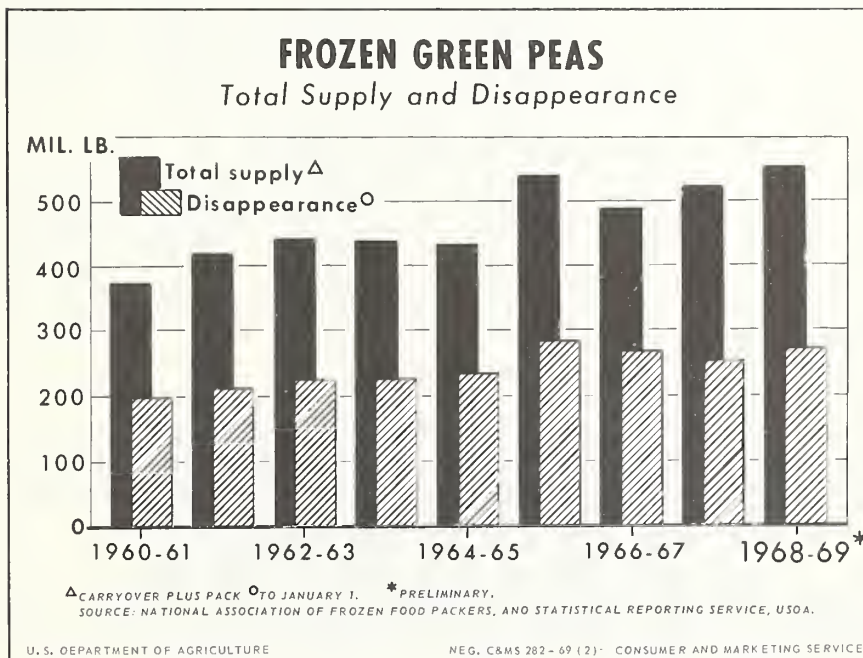


Figure 17

1969 Acreage-Marketing Guides
Vegetables for Commercial Processing

Spinach

Year	: Acreage :	Yield :	:	:	:
	:Planted:For harvest:	per acre	:Production:	Price :	Value
	(1,000 acres)	(Tons)	(1,000 tons)	(\$ per ton)	(\$1,000)
1969 Planted Acreage Guide and probable production					
Canning (acreage 5 percent less than in 1968)	13.9	<u>1</u> /5.8	69.6		
Freezing (acreage equal to 1968)	<u>14.3</u>	<u>1</u> /6.0	<u>77.2</u>		
Total	28.2		146.8		

Background statistics

Canning

1968	14.6	12.4	5.6	69.2	42.57	2,946
1967	15.2	12.5	5.7	71.6	39.99	2,861
1966	13.1	11.9	6.0	71.0	41.16	2,920
1965	12.8	9.7	6.0	58.9	38.83	2,288

Freezing

1968	14.3	13.0	6.7	87.0	40.89	3,557
1967	16.5	14.7	5.8	85.5	41.02	3,506
1966	13.8	12.9	5.8	74.9	41.58	3,115
1965	13.6	11.7	5.7	66.3	40.49	2,684

Total

1968	28.9	25.5	6.1	156.2	41.64	6,503
1967	31.7	27.2	5.8	157.0	40.55	6,367
1966	26.9	24.8	5.9	145.9	41.37	6,035
1965	26.4	21.4	5.9	125.2	39.90	4,972

1/ 1964-68 average yield.

Comments

Total acreage of spinach for processing in 1968 was decreased 9 percent. A reduction in Florida's winter acreage and in Oklahoma's spring and fall crops accounted for much of the decrease.

In 1968, yields ranged from low in the winter areas to record high in the spring and fall areas. Warm weather limited winter crop yields in Florida. Rains caused some crop losses in Arkansas and Oklahoma.

Total production in 1968 was slightly below 1967, but well above average. A moderate reduction in winter output was nearly offset by more spring and fall production compared with a year earlier (see Figure 18). The 1968 total production for freezing was increased slightly compared with 1967, but that

for canning was down moderately.

Spinach - Canned

In spite of a growing population, the total disappearance of canned spinach has been holding within a narrow range. This has resulted because of a slight decline in per capita use. Complete data for the 1968-69 pack are not yet available. But the 1968-69 total supply, carryover plus pack, was estimated to be slightly above last season. With a normal rate of disappearance, the 1969 carryover will be somewhat higher compared with 1968. Therefore, a moderate reduction is recommended in the 1969 acreage for canning.

1969 Guide - Canning

The 1969 guide is a planted acreage 5 percent less than in 1968. Such an acreage, with normal abandonment and a 1964-68 average yield, will result in a production slightly more than in 1968.

Spinach - Frozen

The supply of frozen spinach has increased substantially during the 1960's (see Figure 19). The 1968-69 total supply, pack plus carryover, was estimated at approximately 200 million pounds. Disappearance has been at a relatively high rate during 1968-69. On January 31, 1969, the frozen holdings were 56.4 million pounds compared with 49.6 million a year earlier.

The 1969 carryover is expected to exceed last year's 42.4 million pounds. Consequently, a reduction is recommended in 1969 production for freezing. With average yields, however, an acreage in 1969 equal to 1968 would result in a smaller output for freezing.

1969 Guide - Freezing

The 1969 guide is a planted acreage equal to 1968. Such an acreage, with normal abandonment and a 1964-68 average yield, will result in a production 11 percent less than in 1968.

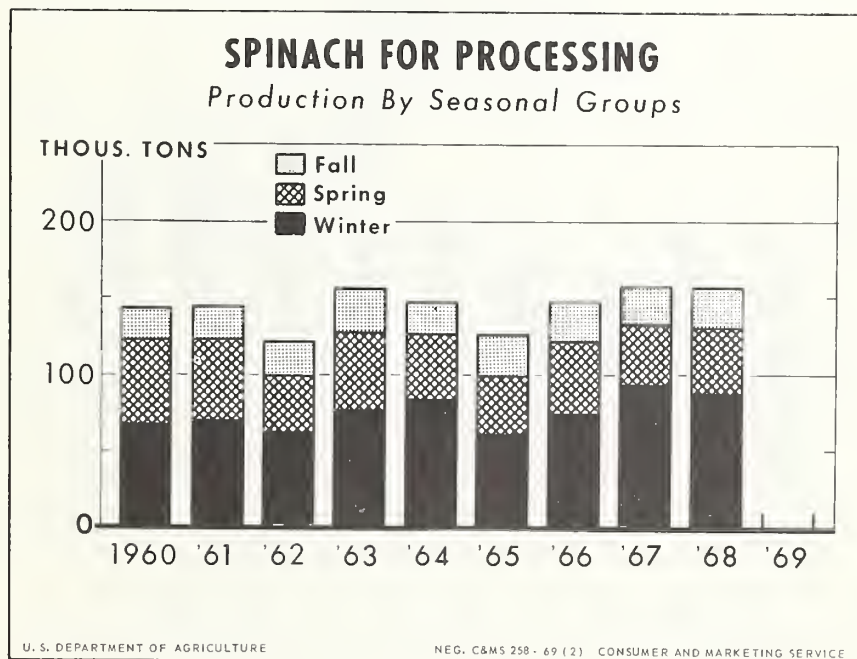


Figure 18

Supply and Disappearance of Processed Spinach

Commodity	Marketing Season				
	1968-69	1967-68	1966-67	1965-66	1964-65

Canned Spinach

Million cases (basis 24/303's)

Carryover	3.1	2.9	3.0	4.0	3.5
Pack	N.A.	7.4	7.0	6.4	7.6
Total Supply	N.A.	10.3	10.0	10.4	11.1
Disappearance	N.A.	7.2	7.1	7.4	7.1
Carryover	N.A.	3.1	2.9	3.0	4.0

Frozen Spinach

Million pounds

Carryover	42.4	34.7	30.4	38.2	35.1
Pack	N.A.	153.2	142.9	122.3	127.0
Total Supply	N.A.	187.9	173.3	160.5	162.1
Disappearance	N.A.	145.5	138.6	130.1	123.9
Carryover	N.A.	42.4	34.7	30.4	38.2

N.A. - Not available.

Sources: National Cannery Association; Bureau of the Census, U.S. Department of Commerce; National Association of Frozen Food Packers; and the Statistical Reporting Service, USDA.

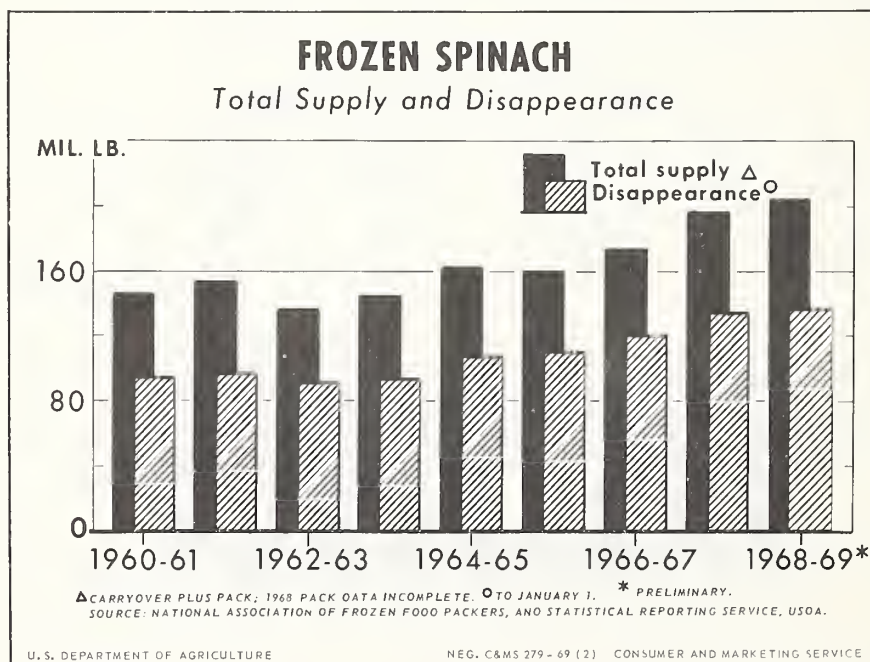


Figure 19

1969 Acreage-Marketing Guides
Vegetables for Commercial Processing

Tomatoes

Year	: Acreage :	Yield :	:	:
	:Planted:For harvest:	per acre	:Production:	Price : Value
	(1,000 acres)	(Tons)	(1,000 tons)	(\$ per (\$1,000 ton)

1969 Planted Acreage Guide
and probable production
Canning (acreage 25 percent
less than in 1968 in Cali-
fornia, and 5 percent less
in all other States) 307.5

1/ 17.2 5,218.5

Background statistics

Canning

1968	371.7	367.6	19.0	6,967.6	40.31	280,876
1967	333.4	327.6	15.8	5,187.4	42.79	221,982
1966	306.0	300.1	15.5	4,660.6	35.69	166,345
1965	261.0	257.4	17.5	4,501.1	37.16	163,913

1/ 1967-68 average yield for California; combined yield for other States.

Comments

The total acreage of tomatoes for processing was increased 11 percent in 1968, and was the largest planting since 1952. Change in acreage was relatively small in most States except California, where there was an increase of 22 percent compared with a year earlier.

In the spring, cool temperatures and rain in most sections of the Nation slowed crop growth. But summer and fall weather was generally good for development. The U. S. average yield was a record.

In California, where tomato varieties have been developed that are particularly adapted to machine harvest, near-perfect weather contributed to a State record yield and production of tomatoes for processing.

The U. S. total production was a record, (see Figure 20) and one-third higher than in 1967. California's production was up 54 percent, and accounted for 70 percent of the U. S. total output compared with an average of 62 percent. In Ohio, second in rank in production, 1968 output was up 15 percent. In New Jersey, third in rank, production was up 2 percent.

In California, New Jersey, Indiana and Ohio, labor problems resulted in some quantities not being delivered to processors. Nevertheless, the 1968 crop value was a record \$281 million, almost double the 1962-66 average.

Complete data on 1968 packs and 1968-69 canners' stocks of tomatoes and tomato products are not available. However, the 1968 aggregate carryover of canned tomatoes, tomato juice, catsup and chili sauce was estimated at 36.0 million cases (basis 24/303's). This carryover was up 7.3 million cases

compared with 1967.

The 1968 pack of tomato juice, excluding vegetable juice mixtures, was slightly less than the 1967 pack, which included these mixtures. The 1968 pack of other tomato products was estimated to be extremely heavy, and much above 1967.

Supplies of canned tomatoes and tomato juice, catsup and chili sauce continue heavy. As a result, prices for these items likely will continue under pressure into next season. In addition, any improvement in market balance in domestic supplies may encourage additional imports of processed tomatoes. The establishment of market balance in processed tomato items will require a substantial reduction in 1969 tomato acreage for processing, especially in California, the major source.

1969 Guide

The 1969 guide is a planted acreage 25 percent less than in 1968 in California and 5 percent less in all other States. Such an acreage, with normal abandonment and a 1967-68 average yield, will result in a production 25 percent less than in 1968.

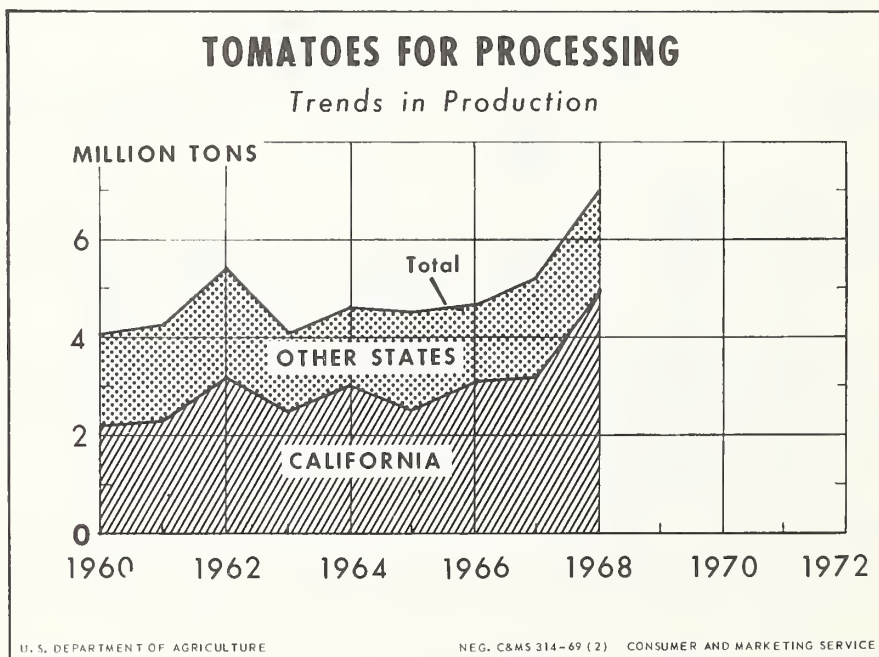


Figure 20

Supply and Disappearance of Processed Tomatoes and Selected Tomato Products

Commodity	Marketing Season				
	: 1968-69	: 1967-68	: 1966-67	: 1965-66	: 1964-65
<u>Canned Tomatoes</u>					
	Million cases (basis 24/303's)				
Carryover	11.1	8.2	9.4	8.7	9.9
Pack	48.8*	39.1	32.7	36.0	36.4
Total Supply	59.9*	47.3	42.1	44.7	46.3
Disappearance	N.A.	36.2	33.9	35.3	37.6
Carryover	N.A.	11.1	8.2	9.4	8.7
<u>Tomato Juice</u>					
Carryover	11.1	9.3	10.9	12.6	12.7
Pack	42.8*	42.8	38.9	40.0	43.1
Total Supply	53.9*	52.1	49.8	52.6	55.8
Disappearance	N.A.	41.0	40.5	41.7	43.2
Carryover	N.A.	11.1	9.3	10.9	12.6
<u>Catsup and Chili Sauce</u>					
Carryover	13.8	11.8	9.7	10.9	13.4
Pack	46.1*	39.4	37.4	35.6	34.0
Total Supply	59.9*	51.2	47.1	46.5	47.4
Disappearance	N.A.	37.4	35.3	36.8	36.5
Carryover	N.A.	13.8	11.8	9.7	10.9

* Estimated.

N.A. - Not available.

Sources: National Canners Association; and Bureau of the Census, U. S. Department of Commerce.

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